

2024 GRANT/DONATION ONLY FISCAL SPONSORSHIP APPLICATION

from

Economic Empowerment Foundation for Exempt Startups & Small Businesses (EEF-501c)TM
Part of the **501c Business Incubator CouncilsTM** network of Startup/Small Business Development Charities

Dear Fiscal Sponsorship Applicant:

The “*Economic Empowerment Foundation for Exempt Startups & Small Businesses (EEF-501c)TM*” officially began in 1998 as telnet help for online classmates needing software for homework.

In 2002 it became *ED-Lab Online* an Application Service Provider (*now Cloud Computing/SaaS*) for online Student/Instructors doing pop-up training room rentals to keep it free it then itself becoming the former name, *The Learners Lab*.

Now more than 22 years since ED-Lab became official even with new names for *EEF-501cTM* and the 501c Business Incubator Council, remain the first & only economic, professional & small business development business, public charity & single source path to business assets resources for the 501c Startup, Entrepreneurs and Small Business.



We are who we help, we work from the ground up, and combined it's why our insight and instincts are what they are making our fiscal sponsorships seamless. True sponsorship should be what you need, how you need it not what someone feels like doing for a quick payday. With us, you ask and we'll work to make it happen, tell you when we can't, and get help when we need.

We reserve the right NOT to approve any Application determined to present a Conflict of Interest for us of any type or on any level.

Thank you so much, and stay safe!

Jerri D. Thomas MBA, MPA, PhD Student (on-hiatus)
EEF-501c Founder, CEO, Chair
501c-BizIncubator Cncl Founder & President

/Corporate Office
/Board & ResAgent Files

Economic Empowerment Foundation for Exempt Startups & Small Businesses (EEF-501c)TM
501c Business Incubator Council, LLC (501c BizInc Cncl)TM

EEF-501c Tax ID 45-5222602 | PO Box 609, Bowie MD 20815 | 501c-BizIncCncl Tax ID 99-3004881



Fiscal Sponsorship Application
 ...Grant/Donation Processing Continued...

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ANNOUNCEMENTS

July 31, 2024

This is unusual but necessary. As of today two executive decisions have been implemented which more than double the size of this document.

First is the inclusion of a *reject prevention section* into our Fiscal Sponsorship Applications. Second is *extending* Grant & Donation Processing Offerings. Third=FYI: search is on for a replacement site to host our Podcast until we are in our HQ.

REJECT PREVENTION ALERTS!

We are seeing and learning of so many setbacks of F1023/1024 Applications for Tax Exemption we've decided to run the risk of annoyance to include **ALERT** information with examples we know will either prevent our Awardees from acting on or continuing to facilitate that can get them in trouble with their home State, or denied exemption by the IRS.

We know others are facing, including those who have asked for our advice then not listening to the compliance requirements our responses are based upon because word gets back to us even though they are not Awardees.

EXTENSION OF GRANT AND DONATION PROCESSING

The IRS has always experienced delays in its processing however, it has not been successful in overcoming then catching up to the delays initially triggered in early 2017 by the reallocation of funds to build the Wall, already behind when the COVID lockdown happened, persistent delays even with mods to their processes have extended their completion times well beyond published timeframes.

We're seeing and experiencing EXTENSIVE delays plague the IRS in a great many areas especially in Exemption processing from incoming applications to the most basic of task like updating records when a businesses name changes.

<p>We changed our business name in Feb that is a State controlled function for which the Federal Govt must keep current with.</p>	<p>Occupancy leases, biz vehicle, even cell phone or other accounts are all impacted by having a new biz name with old EIN which still references the old name. So if we are seeing these inconsistencies in recognition of a business name, you could expect to encounter similar issues for example with technology purchases, grants you like to pursue or other assets that will fall beyond your reach because its taking longer than the norm to receive your exemption.</p>	<p>The Tax Exempt/Govt Entities Unit (TE/GE) has new leadership and we are hoping for more common sense/streamlined approach to processing F1023/24 applications even further so that exempt businesses don't continue to be caught by unforeseen that further delay or stall their forward movement. These instances are increasing so consistently we resurrected a consulting service as a charitable working group form dedicated to documenting these types of events and solutions crafted</p>
<p>It's the end of July and the IRS literally just updated its records for The Foundation to its new legally registered name.</p>	<p>We've been able to move on some</p>	
<p>Our LLCs name was changed at the same time both were reported at the same time, yet they were also treated entirely different. Not only was the LLCs name changed, it was offered</p>		

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<p>the choice of keeping or establishing a new EIN. So its info was updated 26 days later, where the Foundation had to wait for more than 5 months.</p> <p>In addition to bank accounts, other things like certifications, membership,</p>	<p>things while seeing others stalled and though it only fair that grant & donation administration services be relaxed to that our Awardees who may experience excessive delays awaiting their Applications determination not be penalized or miss out</p>	<p>to keep things moving.</p> <p>Those sections are further into the application and we hope you continue on to complete the application once you read (not skip) thru them and again, thank you for trust us enough to inquire.</p>
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OVERVIEW

- Our Fiscal Sponsorships operate virtually, in person, nationally, and Multi-Lingual on Request as we hire.
- Our Podcast Series is delayed but launches when we secure a new host location. We have two series, and their Episodes Spotlight new Startups, others are Hosted by them, Our Awardees get 1st Dibs. You In? [Y] [N]
- We HELP with whatever you need, show or train to ensure your understanding is both accurate and complete,
- Program Management is available for a monthly stipend, terms must be requested for inclusion in to specify in Program Registration and Right to Represent,
- Grant/Donation Administration is available, schedule/terms must be reviewed to specify in Program Registration and for inclusion in Right to Represent,
- We help 501cs from early idea stage, thru 5th year operations and sometimes beyond that. Having been there ourselves, we focus heavily on exempts who through no fault of their own find they are stuck in startup mode,
- Programs are category based with sponsorship classified from basic to customized. We have accommodate multiple entities at the same time and will make your effort an Special Project Sponsorship to internal to use that You Run if you unable or not positioned to and require longer than 2 years. Example; free product donations.
- We're an exempt whose procurement emulates the Govt with registered suppliers. However there's a closed system where only the Govt see them, our is open & Offerors are available thru 2 image directories. One is just listings, the other populates our *Pollination Partners Network*. These are vetted businesses for auto/direct referrals thru 3PM our Procurement system where everyone has visitor exposure as seller and a buyer. So you also have a pool asset sellers that is always consistent, price-friendly reliable and choosing you as a Startup25mBiz market they want to serve.

BENEFITS, ELIGIBILITY, TERMS, ASSETS & PERKS

INTENT

We used to "work relentlessly" to create connections, programs and B2B opportunities so 501c startups, & small businesses had equal access to funding, lending, merchant, media, operations resources on par with for profit startups. But the volatility of recent years, then COVID exposed intents that ranged from fake & inconsistent to vicious & predatory.

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So we expanded our own assets & elevated other supports and created our own network charities to funnel incubator services propelling success of Exempt Startup & Small Business Peers by sharing what's we created to replace what we are denied access to, and changed our names so they say it all.

GOODY-GOODIES

Here's a quick list, the attached org chart shows the full portfolio of charitable, programs, services & products pending Patent/Trademark applications, all delivering what you need directly to you.

Recent & Upcoming 2024 Launches	In the Works & Coming Down the Pike
<ul style="list-style-type: none"> ♦ 501c Startup & Small Business Collective (501cSBC)TM (impact solutions working group forum) ♦ National Chamber of Tax-Exempt Small Businesses (NCTSB)TM (unifies & promotes the Exempt Business Concern) ♦ Association of Tax Exempt Startups & Entrepreneurs (ATESE)TM (Founders Assn for the 501c Startup & Small Biz) ♦ Exempt Entities Mentors Council (501c-MC)TM (exempt version of SCORE but longer & far more personalized) ♦ The Helping Hand Fund (HFF)TM (small \$1 lending, Stipends for Awardees & Volunteer's & more) ♦ 800BlowOffSomeSteam.comTM (anonymous venting site for exces) ♦ Academic Partnership Initiative (API)TM & A Leg Up for 501c Startups (501cLegUp)TM ♦ ED-Lab Online IITM (Student Intern Training Portal) ♦ Fair Mrkt Valued Assets (FMVA)TM (real estate donations for 501cs) 	<ul style="list-style-type: none"> ♦ The 501c Federal Credit Union (501cFCU)TM (Chartering in Process) ♦ The Fellowship Academy for Leadership & Business ContinuityTM (Fellowships, ProfeDev, Prgrms w/Mentorships & more) ♦ Podcasting Business Center (PBC) (our Official HQ w/natl branches/mobile, ops includes Market Xchange, Member Ops & more) ♦ <i>PBC Comm & Media Center: (2 Podcast Series: 501cSBC & the 501c Startup-2-SmallBiz Xchange)</i> ♦ The Institute for 501c Entrepreneurial Economic Development (I5eeD)TM (Think Tank, search underway for host -sponsor) ♦ The Council for 501c/Tax Exempt Entrepreneurial Policy Development and InclusionTM (I5eeDs 5-division research center) ♦ The Charitable Smiles FoundationTM (sibling Foundation to EEF-501c for our physical, oral & mental health/well-fitness operations)
<p>Legacy Websites</p> <p>old Discount Supply Network websites still active -- its images and links require updating This began as a few Affiliates that exploded into more than 120 so a website with subdomains was rush to get assets published but with no one to maintain, not all the affiliates links got posted, The visuals are very outdated but many of the links point to an active website with current discount offerings, and that is why its still active. Njoy!</p>	
<p>https://www.thelearnerslabfoundation.org</p>	<p>https://www.thecompetencegrouppllc.com</p>
<p>https://supplies.thecompetencegrouppllc.com</p>	<p>www.thecompetencegrouppllc.com/moneyconnection</p>

A web map alarmed hyperlinks will connect you to its respective sights. These orgs provide everything from peer-based memberships, to a mentors council, business exchange, donated real estate, and media communications.

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We're even chartering our own Federal Credit Union to meet our unique needs as legally registered business concerns that just happened to be exempt entities. We converted internal resources turned growing network of charitable operations so that you have **NO GO BETWEEN BETWEEN YOU AND WHAT YOU NEED FOR YOUR EXEMPT BUSINESS.**

WHO'S ELIGIBLE & WHOSE NOT

We are chartered for US activities only. Applicants must be a US Business legally registered as a Non-Stock Entity (of whatever verbiage your State Government uses). Here in Maryland its Non-Stock Corporation, and several states can also allow Nonprofit LLCs.

Feel free to visit the United States Internal Revenue Service (IRS) website at www.IRS.gov for clarification on the definition of a United States tax exempt entity TE vs. GE (government entities) and the 25+ classifications which will determine use of IRS Form 1023 or 1024. A sub-chapter classification is part of the determination process and will influence what taxes you are exempt from and what tax you must pay. Letters of Determination state all three.

Applicants must be:

- ♦ pursuing tax exempt status, **or**
- ♦ awaiting the IRS ruling on their F1023/1024 Application for Tax Exempt Status, **or**
- ♦ have a letter of determination indicating the IRS has given them a favorable ruling, meaning they already been granted tax exempt status as defined by the United States Internal Revenue Service (IRS) qualify, **or**
- ♦ be an individual or group desiring a charitable endeavor but are not able or positioned to see it thru or accept contributions directly, **or**
- ♦ another type of entity transitioning to exemption or planning the transition to exemption

SORRY BUT NO'S

Orgs not eligible include *For-Profit startups that just need help* – you have access to resources exempt businesses cannot pursue or are barred from and eliminating those asset gaps for them is why we are here. *Government Entities (GE)* which are exempts established by a Government agency to operate a government program or administrative program funds, and *any Non-US business looking for US sponsorship*. For you we can research our Peers and compile a list of Sponsors who serve the International space.

We have a Research Request Application (RRA) & a fee payable in Certified US Dollars. However as we are not chartered internationally, that is the most we are able to do. We also do not make recommendations.

FYI: CONDITIONS FOR ACCEPTANCE OF GRANTS/DONATION

As is true of anything, there are a number of misconceptions about becoming an exempt business entity and even more about pursuing grants and fundraising.

Since we have your attention this is a good place to ensure you are properly and accurately informed, so you are never caught off guard by incomplete or inaccurate information. It is critical because it is the sole determinant for how you should move forward in any sponsorship, in planning grant/donation outreach, is some of the work intended as an exempt entity – and that is across the board.

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The following hot topic focuses on activities with the most adverse impact to a F1023/24 Applicants forward movement.

EXEMPTION PROCESS & FREQUENT APPLICANT TROUBLE SPOTS

The process to tax exemption really is a straightforward one, but its extraordinarily tedious and its those devil of details that get folks every time. Fortunately, we had a relative who created them frequently for their Frat and we learned it so young it's instinctive. So we keep up with process and regulations as they materialize but we also work from the ground up and are who we serve.

That said, know that your hiccups are ours as well, that's why we are different. We are constantly honing and note areas folks repeatedly trip themselves up on and that we ourselves miss/forget/overlook from time-to-time.

PLEASE NOTE: We (our Founder) has a 100% perfect submission approval record. As in **NEVER** had a F1023/24 Application denied, delayed/returned for incompleteness by the IRS when submitted as prepared by us or adhered to when the recommended guidance/instructions were followed without any change.

No experts here, experts don't think they need to learn more and we're all about it, experiencing much first hand and crafting solutions to get by. Those solutions are what we are sharing/providing/including.

So with that, here goes:

- **Exemption comes from the Federal Govt** not the State you register your business with. *The State registration is a business classification type which is how they are able to allow you to register as an exempt entity BEFORE the Feds give you permission to operate like one.*
- **Exemption = Drivers Permit, its permission given to do something**
 - in the public good,
 - to act like an extension of the Federal Govt,
 - Exemption is temporary,
 - must be renewed, maintain,
 - can and WILL be suspended, revoked &
 - if suspended or revoked then you must start over to reestablish from scratch
 - does not guarantee receipt of grants
 - does not exempt you from ALL taxes, only taxes directly related to your missions exempt sub-charter classification
 - is still taxable from private industry on a company by company basis unless exemption by policy is applied for then granted
- **It matters not who you hire to do whatever, you are STILL responsible for knowing everything**
 - **about your org, its finances, compliance obligations and operationally**
 - that your exempt entity does/does not do,
 - is obligated for, and
 - **For grant-givers, it's the *knowing about*** (not necessarily doing it yourself) that can be the difference between getting and not getting an audience more or less a grant.

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Everything is put in writing and is anticipated to be known by you when you encounter a Govt Officer. It's meticulous but some of those things are deal breakers

BIGGEST TROUBLE MAKER

The main trouble we see business get into are predictable like clockwork and 100% avoidable:

- **NOT ESTABLISHING A SALE/USE TAX ACCOUNT once you start you business operations, and**
- **FUNDRAISING AS SOON AS YOUR BIZ REGISTRATION IS APPROVED BY YOUR STATE**

Both are no-no's that will get you in trouble with your State and denied exempt status from the IRS –

Both are also the 1st touch points the IRS screens when processing F1023/24 submissions, especially the 1023EZ. These are both self-inflicted setbacks that will cost you time and money to resolve.

EXEMPTION HERE YOU COME!

Here is the complete series to the Exemption Process –in order from start to finish

Step 1: Incorporation

- ♦ Register for Business License with incorporating State
- ♦ Register Business for Sales/Use Tax with Comptroller for Incorporated State (& then home State if different, i.e. Incorporate in DE, home State is MD – sales/use tax required in DE & MD)

Step 2: Federal Registration

- ♦ Apply online for EIN
- ♦ Download Form 10233 or 1024 for your desired entity and complete as draft.
 - Include all parts required for your particular exemption
 - Have complete org chart, proposed board, conflict of interest (even if in draft)
 - Have complete articles (not state but internal)
 - Have complete examples of mission, work being done, results from services, whose being helped/served

Step 3: Fundraising

To fundraise internally, there are two paths, both land you in the same place – Registered on your States Charity List.

To accept donated funds from Federal/State Employees (Combined Federal Campaign), you must be registered with your State on their Charities List for a specific period of time **BEFORE YOU CAN APPLY TO BE INCLUDED** Combined Federal Campaign list receive Govt donations. Minimum time frames varies from State to State, DC, PR . We are producing a Master Resource Guide and Encyclopedia as a complete one-source guide and charts with this type of data are part of what's included in it.

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Example. Here in Maryland, you have to be on the State Charity list for 2 years before you are eligible to apply for MDs Combined Campaign. We've been registered but have not applied to MCC electing to wait until our expansion and new biz name processes were complete. Both are as of July 2024, so we will be submitting our application for the MCC's 2025 list cycle soon as we receive the notice the registration period is open. MDs also has a short windows and in some years that window is a different time frame. So early on we applied knowing we didn't qualify so we would be on their notification list and each year since we've received an invitation to apply when it opens up.

One final alert - the CC notice/ registration cycle may be shorter than or end before your States Charity Registration Cycle. If so, this mean you may have to wait 3 years instead of two based on how and when those dates fall within your State. Again, here in MD, our registration cycle end Feb 28th, our automatic extension to renew is August 13th.

However, MCCs last end of registration cycle was the 13th of Feb. So be mindful of what the dates are they may change on an annual basis and you don't want to caught else you'll have to wait another year.

To engage in fundraising, your Two (2) paths to choice between are:

Acting Without Your IRS Exemption	Acting After Receiving Your IRS Exemption
<p>If you do not have your Letter of Determination from the IRS, <i>you can only accept donations and pursue grants thru a Fiscal Sponsor.</i></p> <p>The Fiscal Sponsor must have a <i>Right to Represent Agreement</i> under both it and your signature granting it authority to act on your behalf & to pursue/accept funds for your entity</p> <p>HOWEVER, THEY MUST HAVE THEIR OWN BANK ACCOUNT, and they must be able to articulate under their own Letterhead with State permission to do so when beyond their HQ home (registered)</p>	<p>Once you receive your Letter of Determination <i>you must register with your States Charity Authority.</i> As do your Sponsors</p> <p>In some States that process goes to the Governors Office, in others it's the Office of The States Attorney General.</p> <p>In all cases:</p> <ul style="list-style-type: none"> • There is a fixed term of registration requirement, different application process, fee amount, submission process and criteria to satisfy BEFORE you are eligible to <i>Apply for Permission to Fundraise .</i> • <i>As an Exempt or Applicant you are still responsible for registering with their State, because you are responsible for having a Sale/Use Tax account for IRS exemption approval.</i> <p>Example: Here in MD I registered first now renewal Annually as a 501c and I do so every year in order to be eligible to Apply to other States, for their WRITTEN Permission to fundraise..</p> <p>Once Approval is granted, I as a Sponsor must establish a separate bank account to accept funds for my Awardees behalf. Those are then reported on 990s along with our 990 n .</p>

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PROGRAM CATEGORIES & FEE SCHEDULES

PRIMARY SPONSORSHIPS

EEF-501c's Fiscal Sponsorship program has 6 Primary categories surrounding the exempt formation, business setup & program operations. All include a nominal, non-refundable application fee to offset processing, legal and other costs including external ones. We keep all fees as modest as is possible to do and we are able to do so because our parent, the 501c Business Incubator Council, handles as many compliance & regulatory obligations as is possible, saving is charities money for overhead they don't have to recover. **This Application is for Categories 4: Grant/Donation Only.**

They are as follows:

- **Category 1:** Applicants Pursuing Tax Exempt Status But Not Ready to File: \$575
- **Category 2:** Applicants Ready to File for Tax Exempt Status But Require Some Level of Assistance: \$425
- **Category 3:** Applicants Needing Operational or Program Management (*filing status not a factor*): \$375
- **Category 4: Applicants Wanting Only Grant/Donation Processing Services: \$275**
- **Category 5:** Applicants Needing Tech Products/Equipment Purchase: Volume \$350/One-Time \$150
- **Category 6:** Application for the FMVA Donated Real Estate (FMVA/DRE) Program: \$325

Category 1-3 include Grant and Donation Processing, Cat 4 is when *only* Grant and Donation Processing is needed.

SUPPORTING SPONSORSHIPS

We have several customized sponsorship and have no problem creating additional sponsorships for needs that fall outside the traditional. Thus far that effort includes:

<p><u>Special Project Fiscal Sponsorships (SPFS)</u> If you are a For-Profit, an Individual, or Group with a Charitable Programs, Project, or Product that is a Charitable endeavor, we've created the Special Project Fiscal Sponsorship.</p> <p>The SPFS is a Sponsorship we make an in-house "special" program/project/product development/deployment initiative, only you run it and we provide you the support required to do so. Submit a Letter of Request (LOR). Fee is \$1250.</p>	<p><u>Dual-Multiple Entity (DME) Fiscal Sponsorship:</u> DME is our Dual-Entity Fiscal Sponsorships (Duals): DME is a Combined Application for 2 Entities were its Application & Registration are Combined</p> <p>DME is 1 Application for 2 entities where the Fee has been reduced but still combines both application & registration. This fee is \$1750.</p>	<p><u>Multiple-Entity Fiscal Sponsorships.</u> (DME+) DME+ is a Combined Application for 5 Entities were the Application & Registration are Combined into 1 package with two sections. The first section is the Application Summary - this summarized the Group.</p> <p>The second section is the Service & Program Registration, this is where you spell out the needs of EACH entity. Fee been discounted to allow for 4-5 entities \$3350, Should there be an additional entity with sponsorship needs, its advised that a Lead entity be selected for up to 5 so we can determine the best inclusion option. For example, if 1 entity is Grant only, problem solved because they must be complete the Cat4: Grant/Donation Processing Application anyway.</p>
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Creating something from nothing is what we do and we're good at it. So if you don't see it, ask - if we can we'll make it happen, else we'll get you as close as is possible. Our Category 1-3 F1023 or Ops Assistance, Category 5: Tech Purchases & Category 6: Real Estate Donation each have their own purpose-specific FS Applications. Our Special Support Sponsorships use this Apps content but tweaked.

Fee Policy

Application Fees are not refundable but should circumstances change our Registration fee is refundable thru the 5th business day, less \$65 to cover any subsequent transactional or instrument processing fees we incur.

For example, our very first Awardee was a natl *Teachers Program* with a Grant pending and 3 days in, he received his determination letter. Where others would have, we had no intention of keeping those funds.

Flexibilities

Need an Invoice first, sure thing. State in your LOI and we'll provide an Invoice with the Application, or email to your attention.

No funds to cover your Application/Registration fee? If you have a grant pending, no problem, you can use your grant can to cover the App/Reg fees.

No enough funds or not possible to pay upfront, again no problem -- lets chat about it. We have other options you may be able to utilize thru our Stripe Partnership.

PROGRAM TERMS

Fiscal Sponsorships run 6 months - 2-years in 6-month increments, no smaller.

After 2yrs Awardees wanting to continue move to *TASC*, for support for everything but Grants, which legally requires a Fiscal Sponsorship?

Cat 4 Grants/Donation Only is the only Special Circumstance Extendable Sponsorship, this and similar arrangements may or may not be advertised .

Our intent is to help every applicant that applies, we will only do so IF we can do as is requested. Be advised, acceptance is not automatic, consultation has no influence. Us having what's needed and the ability to deploy it is what results in an approval, hence LOIs so that can be pre-determined.

In fairness to other applicants, renewals after 2 years are not accepted for sponsorships other than Grant and Donation Processing.

Cat 4: Grant and Donation Processing will be indefinite, for Cats 1-3 your Sponsorship will transition to TASC after the 2-year cycle ends but it will remain open-ended should grant/donation needs arise so that you can take advantage of those opportunity in spite of any IRS delays.

We'll have an Amendment for both our signatures allowing you to resume your Sponsorship for the duration of your grant/donations administration, and we'll do that as many instances as is required until our assistance is no longer needed.

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Our *Technical Assistance Service Center (TASC)* was established specifically for business support without the FS commitment. Its open-ended so duration are as long or short as needed, and Awardees are able to continue getting what they need for as long as is desired.

Q&A: APPLICANT/ORGANIZATIONAL INFORMATION

For Clarity, Type Written Responses Only

1. **Your Name & Title:**

2. **Your Preferred Contact Info (Mailing Address, Phone, Email (*only one please*)):**

3. **The Organization Proposed Name & Tax ID#:** (*If you have no tax ID/EIN , call 800 829 4933 or apply online at www.IRS.Gov, its free*)

4. **Name and Title of Other Key Players (if any).** (Volunteers, officers, interim/acting officers, potential board member, staff; if NONE, enter TBD (*to be determined*)):

5. **Location of Proposed Operations (city, state; indicate if operations will be national):**

6. **How did you hear about EEF-501c™?**

7. **If approved by the IRS, what type of tax exempt entity will your organization be?**

- Association Charity Church/Religious Org Education Institution
 Non Profit Private Foundation Public Foundation Political

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8. **Have you completed your IRS Form 1023/1024 application for tax exempt status?**
 Y N In Progress
9. **If not, is that something we need to help you with?** Y N

DESCRIPTION OF YOUR WORK

Please keep responses within the space allotted. Concise, direct answers are fine at this stage, no details are needed. Give just enough information to indicate the need. If approved, you'll be able to elaborate on the **Fiscal Sponsorship Registration Form** which is how we will develop the particulars of your Sponsorship needs in terms of supports and assets. All we require now is a well-crafted outline or summary so we have a general idea.

For example, if you are self-administering your grants, state that here. On your Registration form, you will have a schedule of reports section to provide us with a list of reportings you are preparing that we must co-sign(off) on. If you prefer we administer, you state that here in the App. Then on your Program Registration we'll have a Terms section for reporting obligations, listing you disbursement recipients, a disbursement schedule, etc and the Admin Fee. Grant Administration may be a flat fee or scheduled stipend. Its based on what you need and at what frequency.

SUMMARY

Provide an outline on the basic mission of your organization and how you plan to achieve its goals. Include who, what, why, where, when and how. This is your elevator pitch, we should be able to absorb and comprehend your purpose and activities quickly.

You will be able to elaborate more in your Registration for that's doc is for the nitty gritty details.

WHAT YOU NEED

Our goal is to assist and support the pre-startup phase thru young in operations of US based 501c, including those stuck in startup mode. Tell us...

- 1) **Why your organization necessary, what made you decide to start it, and why will it be successful?**

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2) **What kind of exposure has your new entity had, or does it need. Many are NOT on social media so how can you reach them?**

[Empty text box for response to question 2]

3) **What have you already done to accomplish your goal of achieving tax exempt status? How far along are you in that process, and what other "non-financial" assistance do you need from EEF-501c™ ?**

[Empty text box for response to question 3]

4) **From an operations perspective, how will the organization function? (Explain what you plan to do, whether or not you're already begun, when is your start anticipated, who will be helping, who you'll be serving, and how will you reach them?)**

[Empty text box for response to question 4]

5) **What type of operational infrastructure will your organization need in order to run?**

[Empty text box for response to question 5]

6) **Do you require assistance in developing the operational infrastructure for your organizations planned department? If so, do you need assistance with or connection to any of the following? Check all that apply:**

- a. Organizational Chart, Governance and Overall Business Unit Development []
- b. HR Department and Infrastructure Development []
- c. Finance Department and Infrastructure Development []
- d. Financial Management []
- e. Project Accounting []
- f. Tax Management & Administration []
- g. Technology Department and Infrastructure Development []
- h. Programmatic Development, Professional Development Training Department/Program/Materials []
- i. Industry/Service Specific Policy Development []
- j. Other type of assistance not mentioned []
- k. Compliance, Business or Operational Analytics, Actuarial services. []

If none of the above services are required, tell us what you need, and state if a mentor or special partnership would be helpful.

[Empty text box for response to question 6]

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7) **What else do we need to know about your organization? What other people, entities, organizations are already aware of you and the work you plan to undertake?**

INCOMING/PENDING GRANTS & DONATIONS

Are there any current, future, or ongoing activities we should be aware of with regard to anticipated grants, monetary donations, fundraising activities or investment funding? IF so, please complete the chart below.

Include use of your own personal funds, contributions from friends/loved ones. Donors, Grantors and Investors who might consider Ad or Co-Branding Sponsor/Partnerships will always want to see how much of you own funds and free time you've Invested as a sign of commitment to you entity.

EEF-501c has not pursued any grants, should we we'd disclose from start-yr. 5, 93% off personal funds/7% self-revenue, and maintained since COVID 50/50 self-revenue/EIDL funds, 6% funds and 1% personal funds.

If more space is needed, leave the chart blank, copy it and attach .

AMOUNT	What Are These Funds Targeted For?	Source of Contribution Funds (Circle all that apply)	Date Due or Expected
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name): _____	
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name): _____	
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name): _____	
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name): _____	

1. **Will you require tax administration or finance instruction from a EEF-501c resource? If so, what type of what specific areas do you need help with?**

securing grants/donations securing investment financing other revenue streams

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2. Will you require help that IS NOT donor reliant? If so, check all that apply.

- Membership Dues Technical Assistance* Special Services* Events
 Program Management* Other*

*Briefly summarize below, you can articulate on your registration form)

FISCAL SPONSORSHIP: PROGRAM & PROCESSES

Applying to our Fiscal Sponsorship Program is only a few steps:

<p>1) LOI: gets things going, conveys the info necessary to determine if we can help you, preliminary review make sure eligibility has been met and assuming yes, we send the appropriate Application,</p> <p>2) Application Submission: apps clear Auditing to affirm all compliance materials we're obligated to record were provided and are forwarded to PMO based on Application Category, make sure to include your checklist and the mandatory items on it,</p>	<p>3) Audit Review & Validation: clarification interviews if needed, otherwise confirming legal docs provided, and research to determine info resources are available, if Award can be administered internally.</p> <p>If not, determination of who externally is available, then notification, completion of the Right-to-Represent (R2R), Registration Form to finalize your Welcome Package</p>	<p>4) Award & Onboarding: formal registration into the program is done. Program Registration includes payment of a nominal one-time setup fee of \$550 for Cat 1-3, \$250 for Grant/Donation Processing. <i>This offsets the cost of accounts we must establish as fiscal sponsors for Awardees resources that legally cannot co-mingle with ours, including bank accounts where you have on or not. Stipend or Flat Fee for Grant/Donation Administration based on activities).</i></p>
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APPLICATION & SUBMISSION

For the duration of the year, we are accepting **electronic payments only** – given everyone's travel and my dual Probate Court obligations, we don't want to create untimely delays for anyone. If you've not done so previously, you may pay your **Cat 4 Application Fee** using this secure [Stripe Link](#)

To Submit your FS Application , send via EMAIL ONLY

- checklist completed with any items listed when check off for inclusion,
- completed FS Application Package,
- copy of Application Fee receipt as appropriate for your category
- confirm all signature pages are scanned & included

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Email: FiscalSponsorships@501cEconomicEmpowermentFndn.org

...on Subject line:

CAT #4 Fiscal Sponsorship Application Package

...in the body of the email:

FS Program Review Panel

ATTN: Fiscal Sponsorship Application Package
for [[[**YOUR Name & YOUR CHARITIES NAME**]]]

**PLEASE SAVE & PRINTOUT ENTIRE APPLICATION
Initial, Sign & Date as indicated on the following Pages
Then SCAN back to PDF for Submission. Thank You.**

By submitting this application, you are confirming that you have approved all of its contents and that they are truthful.

You are also confirming that (unless you clearly specify otherwise directly in this application form), you are allowing EEF-501c™ to share the contents of your application (but not your contact info) on our website, social media, with outside media and with the general public for the purposes of assisting you and your organization to achieve the goals outlined for your organization within this application.

You are also allowing EEF-501c™ this privilege at a later date as a demonstration of our work and commitment to helping our peer 501c entrepreneurs beyond their pursuit of tax exempt status, details to be articulated upon an award in our Fiscal Sponsorship Program Registration Package.

You further state that if you are request to remain anonymous, that will be articulated in the *Right to Represent Agreement* that is legally required in order for EEF-501c™ to assume the legal, fiduciary responsibility of serving as Fiscal Sponsor to

_____ (name of the organization).

That being said, due to EEF-501c™ is well accustomed in honoring full anonymity of our Awardees. Therefore, it is with your permission that EEF-501c™ will hold in confidence your entities identification and only remark a non-revealing description of the organization as part of its disclosure process when required to articulate information on whom has been served in lieu of a reference, .

[] Please Initial to Acknowledge Submission Terms

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FS APPLICATION CHECK LIST

Included	Required Document	Comments/Additional Info
	1. IRS Letter 147c, Federal EIN/Tax ID	
	2. State Articles of Incorporation (AoI) forming your business as a Non-Stock Corporation or Articles of Amendment (AoA) changing it to a Non-Stock Corp	
	3. Org Chart: w/Names Principal Officer, Board Chair	
	4. FS Application for desired Sponsorship Category	
	5. Application Fee Receipt	
	6. IRS Letter of Determination (if available) or	
	7. IRS Acknowledgement of Receipt for your Form 1023/1024 Application a. when full F1024 is mailed in – grace period still in effect; b. when done online: Printed Acknowledgement for when 1023 EZ Streamlined is used	
	8. Your Check List ☺	

APPLICATION DISCLAIMER & TERMS

Economic Empowerment Foundation for Exempt Startups & Small Businesses™ Does Not Issue or Make Grant Awards of Any Kind. We have Special Projects that award Participants Stipend to off their costs, but they are both specific to specific programs and time sensitive as funds are available to issue.

This application is NOT for the receipt of grants or direct/indirect funding of any kind, or the management of non-financial assets. Therefore, if your need requires funding, your team should pursue the appropriate channels to achieve that goal. For Real Property, request our Cat 6 Fiscal Sponsorship Application.

Please Initial to Acknowledge Funding Disclaimer

Grant & Donation Processing EEF-501c™ will only accept grants and donations on behalf of its Fiscal Sponsorship Awardees for Categories 1-4. Loan and other financing option are not available from EEF-501c, will be thru the Federal Credit Union its charter and small \$1 lending once its Helping Hand Fund is fully replenished. .

Please Initial to Acknowledge Funding Disclaimer

PLEASE NOTE THE FOLLOWING:

While we aim to help everyone, Applications, either verbal, written, or by invitation by EEF-501c™ for fiscal sponsorship should not be construed as an automatic entry into a Foundation’s Program or access to a protected asset. Given the Foundation and its Incubator parent are both hand-on and operate in real-time, Application are ALWAYS used to

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- ♦ qualify or pre-qualify the Pursuing Party,
- ♦ to convey the criteria with which EEF-501c™ relies for making its award,
- ♦ to confirm the Applicants current, future or pending tax exempt status
- ♦ to confirm an Individual, Group, or For-Profit Applicants selection is aligned with the appropriate Category, and
- ♦ to affirm EEF-501c™ current capacity to accommodate incoming request be it internally or supported by PPN(s)

EEF-501c’s Advisory Council (EEF-501c/ AC) meets periodically, and commences new program participation on a cyclical basis as Awardees complete their program. EEF-501c™ ALWAYS reserves the right to modify or close an application cycle, increase fees when costs increase, amend program criteria, and rescind/terminate Awards should fraud or other adverse activity materialize.

Application availability will be announced through print & web media, postings on the EEF-501c™ website, and accepted at least one quarter of each calendar year. The *Advisory Council (AC)* will process and review applications throughout the application cycle and “after” the applications period had ended as needed, and will notify all applicants of their disposition “once the entire review process has concluded.”

Because our fiscal sponsor services are unique and customized to each awardee, the number of Fiscal Sponsorships awarded depends heavily on the requested services, the availability and replenishment of funds, staff, partners, and other resources. We reserve the right to close or pause LOIs received should the level of request outpace support/resources.
[] Please Initial to Acknowledge Applicant Status Disclaimer

SUBMISSION SIGNATURE:

(Hand written only, electronic signatures not accepted)

Authorized HAND-WRITTEN Signatures Only /Date

Title of Signatory (Print or Type)

Name of Your [Proposed] Organization or Program

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